

IMAC Training and Technical Assistance Subcommittee
Meeting Minutes
12/19/03
9:30 – 3:00

Attendees: Theresa Fosbinder (state co-chair), Jenny Hoffman (county co-chair), Russell Yancey (county co-chair), Margaret Romens, Jeff Brikowski, Sara Edmonds, Staci Wanty, Lynda Fischer, Mary Oberer, Stacia Jankowski, Dave Hippler, Vicki Jessup, Deb Solis; By Phone – Susan Rusboldt, Jane Cheever

SCHEDULE AND LOCATION FOR 2004 MEETINGS

We have agreed that our Subcommittee will meet the 3rd Tuesday of every month from 9am – 3pm. Meeting dates for first half of 2004 are 1/20/04, 2/17/04, 3/16/04, 4/20/04, 5/18/04, 6/15/04.

Theresa asked about location of meetings. Should we rotate around the State for those people that have a ways to travel? Theresa will look into availability of meeting rooms in the Regional Training Centers and let us know. January meeting will be in Madison.

Meeting minutes will continue to be rotated among the group. A suggestion was made to have everyone sign up for a date.

WORK PLAN

Previous to this meeting, Theresa, Russell and Jenny had discussed the importance of this sub-committee knowing what initiatives and changes will be taking place in 2004. We decided to do this at the December meeting so we can plan our training strategies at our 1/20/04 meeting.

BACKGROUND

Theresa handed out 2 PowerPoint presentations: “Income Maintenance Training and Technical Assistance Strategic Direction” and “Income Maintenance: Where Are We Now?”

Theresa discussed the overall IM goals and Specific IM goals including the FS and Medicaid error rates. As of today, the State is done with QAs through August 2003 and the statewide error rate is 8.8%.

Vicki indicated that the Medicaid error rate for FFY 2002 was at 8% and the goal is to be at 5%. The Family Medicaid negative error rate was at about 10% and the goal is 0%. Last year Family Medicaid cases were reviewed. This year the concentration is on SeniorCare and next year will be EBD Medicaid cases.

Sara mentioned that when errors are identified, the error letters are reviewed and training needs are considered.

UPCOMING INITIATIVES

Online Handbooks – Dave Hippler

Dave discussed that DHFS is working with Deloitte Consulting to integrate all DHFS related handbooks and to improve the look and feel of the MA handbook that currently only exists as a PDF. He gave us a handout that is from the Texas' State system where Deloitte is doing similar work. The MA handbook (and possibly others) will be similar to FS handbook navigation. The technology (using "Roboinfo") will be there to accomplish links between CARES and the handbooks.

TRANSITIONAL FOOD STAMPS (TFS) INITIATIVE – Jeff Esterholm

Jeff gave an explanation of the Transitional Food Stamp benefits that will begin in March 2004. An Ops Memo will be out around 2/9/04 and CARES changes will be made 2/27/04. In general, individuals coming off of TANF will have their FS allotment frozen for 5 months. The TFS benefit amount is calculated using income, expenses and household information from the month prior to the last W-2 payment. The gross W-2 or Tribal TANF amount will be deducted for the TFS calculation. He also explained that 45 days before TFS closes, the client will get a notice stating they must re-apply for regular food stamps. There will be a new question on ACPA and a new budget screen (EFTF). Anticipated training strategy – Shortly after the Ops Memo is released, an online quiz will be available as well as a TFS training supplement guide with scenarios and/or a PowerPoint.

TRAINING CONSIDERATIONS FOR TFS AND BEYOND

Theresa explained that the first distance learning opportunities which will be accessed and tracked via Pathlore (f.k.a. "Registrar") will be TFS and Reduced Change Reporting. All Pathlore users will be required to complete a PowerPoint which will explain how Pathlore works – before they will be able to take any course.

A concern that was mentioned is that some counties want to do a group training at staff meetings instead of having each individual do a PowerPoint at their desktop. Will counties be allowed to submit a list to the Training Section showing them the individuals that completed that activity through a group setting?

REDUCED CHANGE REPORTING FOR FOOD STAMPS – PHASE II – Sara Edmonds

Phase II of Reduced Change Reporting for FS is scheduled to be implemented 2/28/04. A handout with some specifics was given out and explained by Sara. The State expects about 10,000 interim reports to be completed statewide (of which 5000 will be in Milwaukee) per month. For this phase, training will be minimal. The workers will need to educate clients on the new certification periods and the requirement of completing the interim report at the 6 month marker. A script will be coming from the State to help workers explain this to clients. More comprehensive training will be needed in about May of 2004 as the 1st interim reports will be generated in June 2004 and due in July.

Sara explained that 25 states have already gone to interim reporting and the State was able to learn from their experiences with these forms.

AUTO UPDATES – Sara Edmonds

Planned for fall 2004 there will be auto updates of social security data as well as KIDS data. They would like to improve the interface from KIDS to CARES. They envision a KIDS child support summary screen (similar to UC) so that workers would not have to go into the KIDS system.

“IN THE DISTANCE” – Sara Edmonds

An SSI combined application project is being looked at for sometime in 2006. It would provide an opportunity for SSI recipients to get a FS card by completing a form and submitting it to the State. They would be looking at 1 and 2 person SSI households. The State is looking at the Texas model – standardizing the FS allotment based on shelter expense. They may look at doing a pilot with the individuals over age 65 first and then move to younger individuals.

SAVE PROCESS IS CHANGING – Stacia Jankowski

The Systematic Alien Verification (SAVE) process will be changing from phone based to web based. They will be transitioning it starting 12/22/03 through 3/04 with the expectation that the phone system will be out by 3/2004. Counties will be receiving an Ops Memo in mid January explaining the details.

BADGERCARE VERIFICATION – Theresa Fosbinder

Theresa gave a handout / flow chart (see attachment 1) that explains the new Employer Verification Form Processing for BadgerCare.

BadgerCare applicants/recipients will be asked to verify income (which is now self declared), and insurance access/coverage up front (instead of as a post eligibility process).

She explained that it is likely that when people are found eligible for BadgerCare, they will receive a form that they will need to take to the employer and mail back to a central location at the State level. It is likely that then CAPO staff will scan in the form and an image will be created, as well as data possibly being dumped into CARES. The State is still looking at options for this process – more information will be available soon. If the form is not returned, the case will likely close automatically.

A letter is planned to be sent to employers for their cooperation in this process.

CARES WORKER WEB – Theresa Fosbinder

As mentioned by Dave in the context of the online handbooks, client registration and application entry will become web based with drop down boxes and radio buttons instead of Tran codes and Parmis. This is tentatively set for September 2004.

The group discussed that training for these web- based initiatives will be necessary.

Theresa explained the CARES worker web from the PowerPoint handout – page 4.

- There will be a series of web applications on the IM worker desktop which will include the web view of CARES (being called the CARES Worker Web).
- It is planned that both IM and WD (W-2 and Child care) programs will use the CARES worker web for eligibility entry and determination.
- Phase 1 of the CARES Worker Web will include Client Registration and Application Entry going to a web based view and process. CARES will no longer have a “mainframe” view. It will be a web based usage and view where you will be able to use drop downs, radio buttons and a mouse. There will not be Tran Codes or Parm's for these subsystems as CARES currently uses.
- During Phase 1, CARES will still be used as it is now for Eligibility, Post Eligibility and Confirmation.
- Other subsystems, including Client Scheduling and history maintenance will also remain they are until later phases.
- Per DWD, there is some activity around taking non-eligibility processes such as benefit issuance and case management into another system called ASSET at the same time that the CARES worker web is implemented.
- Dave Hippler will be putting out a survey to workers in a couple of months that will ask them their opinions regarding CARES, and will include mockups and views of the proposed worker web screens for them to respond to. This survey will be online and easy to respond to – it is important that as many workers as possible respond to this survey, and the responses will impact the direction of the Worker Web.

CHANGE CENTERS – Theresa Fosbinder

The State is currently exploring change centers and is analyzing data from counties that are running change centers at this time. It has been a challenge to evaluate change centers and suggestions were made to survey workers, clients and management to get all perspectives. It is likely there will be two models for change centers – a centralized change center and a regionalized change center where counties could contract change center services from other agencies.

FS PROGRAM PARTICIPATION GRANT WEB SELF SCREENER – Theresa Fosbinder

There is work underway on a web self screener to help individuals determine if they may be eligible for IM programs, including food stamps. Eventually, customers may be able to apply online. We will need to train staff on their new role as this happens.

PATHLORE UPGRADE UPDATE – Tricia Bless

Tricia explained that there is an upgrade occurring to the Pathlore system, In addition to the registration related feature that Pathlore has traditionally allowed, it will allow us to do several things:

- see catalog of all courses
- register for classes
- take online classes
- take assessments and see score of an online class
- view transcripts
- pull reports

Pathlore will have Learning Profiles for each individual (similar to the ITPs)

They will be scheduling courses for users to learn Pathlore and explore distance learning opportunities.

NEW WORKER UPDATES – Lynda Fischer

Lynda explained that for 2004 they have scheduled 4 new worker classes – 2 in Mosinee and 2 in Oshkosh. The Milwaukee schedule is yet to be determined. They will not cancel due to low enrollments. If circumstances are right, they will try to bring the training to where the majority of the participants are located.

NEXT MEETING

The plan for the January 2004 meeting will be to focus on Pathlore and distance learning for the new initiatives that are evolving.

